DOCUMENT RESUME

ED 405 490 CE 073 703

TITLE	Learning Objectives.
INSTITUTION	National Association of Workforce Development Professionals, Washington, DC.
PUB DATE	95
NOTE	44p.
AVAILABLE FROM	National Association of Workforce Development Professionals, 1620 I Street, N.W., #LL30, Washington, DC 20006-4005.
PUB TYPE	Guides - Classroom Use - Teaching Guides (For Teacher) (052)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	Adults; *Behavioral Objectives; Dislocated Workers; Educational Needs; *Employment Programs; *Job Development; Labor Force Development; *On the Job Training; *Professional Development; *Trainers; Unemployment
IDENTIFIERS	DACUM Process

ABSTRACT

This document contains work force development learning objectives formulated from focus and DACUM (Developing a Curriculum) groups conducted by members of the professional development workgroup coordinated by the National Association of Workforce Development Professionals (NAWDP). Included are general objectives based on areas of responsibility and subobjectives on tasks identified by the groups. General objectives are considered the core skill areas for individuals in that functional area. Subobjectives are possible areas for specific skill training. Training offerings based on these objectives could address any, all, or various combinations of the subobjectives as components of the general objectives. The learning objectives cover these 10 functional areas in work force development: (1) contract management; (2) counseling and case management; (3) fiscal; (4) job development; (5) marketing; (6) management information systems; (7) monitoring; (8) supervision and management; (9) program planning and development; and (10) training and instruction. (KC)

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ED 405 490

LEARNING OBJECTIVES

National Association of Workforce Development Professionals

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LEARNING OBJECTIVES
National Association of Workforce Development Professionals

These learning objectives cover ten functional areas in workforce development:

- Contract management
- Counseling/case management
- Fiscal
- Job development
- Marketing
- MIS
- Monitoring
- Supervision/management
- Program planning/development
- Training/instruction

The objectives were developed from focus and DACUM groups conducted by members of the professional development workgroup coordinated by the National Association of Workforce Development Professionals.
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Organizations wishing official approval of their use of the objectives must apply to NAWDP under the review and fee requirements established by NAWDP.

The workgroup will continue working with NAWDP to revalidate and revise the objectives on a regular basis.
For more information or for applications for training endorsement, contact the National Association of Workforce Development Professionals, 1620 I Street NW, Suite LL-30, Washington DC 20006, phone (202)887-6120, fax (202)887-8216.

LEARNING OBJECTIVES
CONTRACT MANAGEMENT

March 1995

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GENERAL OBJECTIVES	SUB-OBJECTIVES
1. Demonstrated ability to compile information.	Ability to: 1.1. Develop information sources. 1.2. Assess training needs of clients. 1.3. Review current resources. 1.4. Interpret regulations (federal, state, local). 1.5. Analyze budget information. 1.6. Analyze labor market and workforce information. Demonstrated knowledge of: 1.7. Community resources. 1.8. Relevant information sources. 1.9. Relevant rules and regulations.
2. Demonstrated ability to participate in agency planning.	Ability to: 2.1. Participate in meetings. 2.2. Participate in local and state long-range planning. 2.3. Coordinate committees. 2.4. Develop procurement and contracting policies. 2.5. Write in-house policies and procedures. 2.6. Participate in determination of delivery strategy. 2.7. Participate in determination of program designs. 2.8. Project expenditure levels for planning purposes. 2.9. Project participant levels. 2.10. Project staffing needs. 2.11. Write grant proposals.

3.	Demonstrated ability to solicit service providers.	Ability to: 3.1. Develop and maintain list of potential providers. 3.2. Develop solicitation process. 3.3. Write specifications for providers. 3.4. Create tools to screen providers. 3.5. Establish rating system. 3.6. Develop solicitation packets. 3.7. Write public notices. 3.8. Notify potential providers. 3.9. Conduct pre-bid conference. 3.10. Respond to solicitation inquiries.
4.	Demonstrated ability to select service providers.	Ability to: 4.1. Identify proposal reviewers. 4.2. Train reviewers. 4.3. Determine responsiveness of proposals. 4.4. Evaluate provider responses. 4.5. Assess past provider performance. 4.6. Conduct cost/price analysis. 4.7. Develop summary materials. 4.8. Report evaluation results. 4.9. Recommend contract awards. 4.10. Determine contract types. 4.11. Negotiate contracts. 4.12. Finalize contracts. 4.13. Document procurement process. Knowledge of: 4.14. Business law.
5.	Demonstrated ability to manage contracts.	Ability to: 5.1. Consult with providers. 5.2. Assist in resolving conflicts between providers and participants. 5.3. Verify accuracy of MIS data. 5.4. Verify accuracy of participant payroll. 5.5. Monitor administrative compliance. 5.6. Monitor programmatic compliance. 5.7. Monitor fiscal compliance. 5.8. Monitor participant activity. 5.9. Evaluate services provided. 5.10. Provide feedback to providers. 5.11. Identify technical assistance needs. 5.12. Provide technical assistance. 5.13. Mandate corrective action by provider. 5.14. Modify contract agreements. Knowledge of: 5.15. Appropriate management information system.

6.	Demonstrated ability to coordinate internal and external communications.	Ability to: 6.1. Expand provider base. 6.2. Educate staff about program specifics. 6.3. Develop program fact sheets. 6.4. Conduct interagency and community presentations. 6.5. Assist with marketing activities. 6.6. Prepare status reports. 6.7. Participate in professional development activities. 6.8. Respond to general inquiries. 6.9. Develop position papers. 6.10. Coordinate client, employer, and community resources. 6.11. Inform service providers of local policies. 6.12. Inform service providers and staff of changes in regulations. 6.13. Develop linkages among service providers and other resources.
7.	Demonstrated ability to supervise staff.	Ability to: 7.1. Evaluate staff performance. 7.2. Conduct staff training. 7.3. Conduct staff meetings. 7.4. Consult with staff individually. 7.5. Recommend staff for hiring. 7.6. Assign staff tasks and responsibilities.

LEARNING OBJECTIVES
COUNSELING/CASE MANAGEMENT

Revised April 1995

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GENERAL OBJECTIVES	SUB-OBJECTIVES
1. Demonstrated ability to conduct a client interview and assess client skills, needs, goals and interests. barriers, and available resources.	Ability to: 1.1. Recognize and become familiar with characteristics and behavior which impact client goals. 1.2. Use effective interview techniques. 1.3. Apply active listening skills. 1.4. Establish rapport with client. 1.5. Establish clear client expectations (mutual roles and responsibilities). 1.6. Ensure client understanding of program services. 1.7. Apply appropriate counseling techniques and strategies. 1.8. Identify client needs, goals, and interests (immediate and career/lifelong), skills, abilities, aptitudes, and resources. 1.9. Assess client barriers and strengths. 1.10. Collect required data and determine eligibility. 1.11. Select, administer, and interpret appropriate tests, assessment instruments, and evaluation tools. 1.12. Facilitate client problemsolving. 1.13. Match needs and goals of clients to programs. 1.14. Refer client for internal/external services. Demonstrated knowledge of: 1.15. Legislation and regulations, including eligibility guidelines, data and program requirements, services and activities. 1.16. Legal issues, including documentation, confidentiality, and liability. 1.17. Career and lifelong learning issues. 1.18. Program options. 1.19. Support services. 1.20. Organizational processes and procedures.
2. Demonstrated ability to perform administrative functions.	Ability to: 2.1. Write effective reports, case notes, letters, contracts. 2.2. Document client eligibility. 2.3. Track client activity (training, programs). 2.4. Arrange and document for appropriate services and payments. 2.5. Allocate resources effectively 2.6. Manage participation levels and expenses. Knowledge of: 2.7. Required data, forms, and reports. 2.8. Service options and arrangements. 2.9. Administrative guidelines and requirements. 2.10. Case management systems. 2.11. Outcome requirements, including performance standards. 2.12. Relevant computer systems.

3. Demonstrated ability to assist client in development of realistic goals and an individual service strategy.	Ability to: 3.1. Effectively communicate with client to explain programs and choices. 3.2. Use appropriate counseling and motivational techniques to identify client needs, goals, and interests (immediate and career/lifelong), skills, abilities, aptitudes, and resources. 3.3. Assist the client to develop realistic goals and an individual training and job search strategy. 3.4. Assist clients in career exploration. 3.5. Write an individual plan with clear short- and long-term goals, specific activities, and mutual responsibilities. 3.6. Apply positive interpersonal skills. Knowledge of: 3.7. Community resources and available programs and employers. 3.8. Local job markets and industry turnover rates. 3.9. Case management principles and techniques. 3.10. Motivation theory and techniques. 3.11. Different learning styles. 3.12. Special populations and their needs. 3.12. Crisis, stress and time management strategies. 3.13 Survival skills and life skills. 3.14. Financial aid resources.
4. Demonstrated ability to track progress, maintain client contact, and provide transitional support.	Ability to: 4.1. Establish and maintain continuing communication with clients and employers. 4.2. Develop peer support groups and train peer counselors. 4.3. Facilitate client problem-solving and career planning. 4.4. Monitor contractor performance, including compliance and effectiveness. 4.5. Evaluate effectiveness of training and services. 4.6. Act as post-placement advocate for participants. 4.7. Follow up with employers after placement. 4.11. Conduct site visits to training sites and places of employment. 4.12 Obtain client feedback on programs and services. 4.13. Review and update individual service strategy. Knowledge of: 4.14. Principles of effective communication and counseling, including group dynamics, one-on-one interaction, and negotiation. 4.15. Effective coaching techniques. 4.16. Monitoring data and techniques. 4.17. Career planning strategies. 4.18. Evaluation techniques. 4.19. Case management principles and techniques. 4.20. Motivation and coaching techniques.

5. Demonstrated ability to coordinate and collaborate.	Ability to: 5.1. Establish appropriate linkages with other internal and external resources. 5.2. Participate in team planning. 5.3. Participate in program planning. 5.4. Initiative cooperative agreements. 5.5. Coordinate services and records. 5.6. Work with co-located resources.

LEARNING OBJECTIVES
FISCAL

Revised February 1995

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GENERAL OBJECTIVES	SUB-OBJECTIVES
1. Demonstrated understanding of accounting practices and systems.	Ability to: 1.1. Develop general ledger and subsidiary journals and ledgers (A/P, A/R, Payroll, Property). 1.2. Interpret and apply data. 1.3. Categorize, accrue and allocate costs appropriately. 1.4. Track cash on-hand and other accounting transactions. 1.5. Track and control inventory. 1.6. Apply appropriate regulations and requirements. 1.7. Develop and maintain a chart of accounts. 1.8. Reconcile accounts 1.9. Track accounts payable and receivable. 1.10. Prepare vouchers. 1.11. Handle cash orders. 1.12. Process staff payroll and benefits. 1.13. Process needs-based and support payments. 1.14. Evaluate and use related computer systems. Knowledge of: 1.15. Fundamental accounting and bookkeeping systems. 1.16. Generally Accepted Accounting Principles (GAAP). 1.17. Appropriate program rules and regulations: federal, state and local. 1.18. Payroll and tax requirements. 1.19. Appropriate computer software and hardware.

2. Demonstrated ability to manage financial operations and procedures.	Ability to: 2.1. Analyze financial data and systems. 2.2. Understand and explain financial trends and projections. 2.3. Develop a system of internal controls. 2.4. Monitor adequacy of systems and modify as needed. 2.5. Administer fiscal records retention system. 2.6. Develop policies and procedures for systems including budgetary control, asset management, procurement, contract management. 2.7. Develop documentation manual for accounting and financial systems. 2.8. Assess effects of policies, procedures, rules and regulations, and make appropriate recommendations. 2.9. Identify possible sources of revenue. 2.10. Track and analyze direct/indirect costs. 2.11. Develop and ensure audit trails. 2.12. Provide cash management. 2.13. Manage program income. Knowledge of: 2.14. Principles of cash management. 2.15. Systems analysis. 2.16. Fixed asset management. 2.17. Long-term planning and projections. 2.18. Financial compliance issues, rules and regulations.
3. Demonstrated ability to provide budgetary control.	Ability to: 3.1. Link outcomes to financial strategies. 3.2. Ascertain fund availability 3.3. Construct budgets. 3.4. Identify revenue, fixed and variable expenses, capital expenditures. 3.5. Implement obligational control procedures. 3.6. Monitor budgets against expenses. 3.7. Update budgets based on analysis of actual expenditures. 3.8. Present and explain budget. 3.9. Analyze for cost allocations, trends, and cost category compliance. 3.10. Review and incorporate subcontractor budgets. 3.11. Ensure budget compliance with related rules and regulations. 3.12. Develop contingency plans. Knowledge of: 3.13. Budget format, compilation and presentation. 3.14. Budget analysis. 3.15. Related rules and regulations.

4. Demonstrated ability to manage procurement and contracts.	Ability to: 4.1. Requisition goods and services. 4.2. Define specifications for RFPs and budget considerations. 4.3. Prepare RFPs. 4.4. Review and analyze proposed contract budgets. 4.5. Conduct purchasing, including small purchases and sole-source purchases. 4.6. Conduct cost-price analyses. 4.7. Allocate costs and assure cost-category compliance. 4.8. Develop and maintain bidder/vendor lists. 4.9. Establish and maintain contract files. 4.10. Coordinate with program staff and other agencies. 4.11. Document procurement procedures and ensure legal compliance. 4.12. Present procurement recommendations to management. 4.13. Write assurances and certifications. 4.14. Negotiate contracts and leases. 4.15. Negotiate indirect cost rate. 4.16. Develop budgets for contracts and leases. 4.17. Provide technical assistance to vendors and subrecipients. 4.18. Process requests for funds (reimbursement, advance). 4.19. Administer contractor reports. 4.20. Arrange appropriate insurance and bonding. 4.21. Process amendments to contracts. 4.22. Reconcile close-out documents. Knowledge of: 4.23. Applicable rules and regulations, including cost categories and competition. 4.24. Budget and expenditure analysis. 4.25. Cost-price analysis. 4.26. Principles of negotiation.

5. Demonstrated ability to conduct fiscal monitoring.	Ability to: 5.1. Identify applicable circulars, regulations, and requirements. 5.2. Conduct desk review of expenditures and supporting data. 5.3. Conduct site visit. 5.4. Conduct in-house monitoring for compliance. 5.5. Generate feedback reports. 5.6. Complete mandated forms. 5.7. Analyze fiscal performance. 5.8. Identify and recommend corrective action. 5.9. Identify and provide technical assistance. Knowledge of: 5.10. Applicable rules and regulations. 5.11. Required reports and documentation. 5.12. Resources for technical assistance. 5.13. Procedures to assure compliance.
6. Demonstrated ability to manage audits and reporting.	Ability to: 6.1. Design reports, internal and external. 6.2. Compile appropriate data. 6.3. Interpret data/expenditure analysis. 6.4. Complete required forms. 6.5. Reconcile data. 6.6. Present reports, both paper and oral. 6.7. Prepare for state and federal monitors. 6.8. Facilitate monitoring process. 6.9. Act as contact for auditors. 6.10. Develop responses to questions and findings. 6.11. Facilitate resolution process. Knowledge of: 6.12. Audit procedures and requirements. 6.13. Audit and report formats. 6.14. Internal versus external reporting.

7. Demonstrated ability to manage fixed assets.	Ability to: 7.1. Conduct physical inventory. 7.2. Reconcile annual inventory to books of account. 7.3. Process inventory transactions (transfers, dispositions, replacements). 7.4. Process property reports. 7.5. Ensure security of facilities and inventory. 7.6. Provide maintenance of property and equipment. 7.7. Coordinate shipping and receiving. Knowledge of: 7.8. Inventory systems and procedures.
8. Demonstrated ability to coordinate fiscal operations.	Ability to: 8.1. Disseminate fiscal information. 8.2. Provide technical assistance. 8.3. Provide staff training. 8.4. Coordinate fiscal with MIS and other systems. 8.5. Network with other agencies and organizations for information and technical assistance. 8.6. Provide support for grant applications. 8.7. Provide information for appropriation and legislation preparation. 8.8. Coordinate staff and records. 8.9. Manage fiscal personnel. Knowledge of: 8.10. Personnel administrative requirements. 8.11. Facilities management. 8.12. Administrative systems.

LEARNING OBJECTIVES
JOB DEVELOPMENT

Revised April 1995

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GENERAL OBJECTIVES	SUB-OBJECTIVES
1. Demonstrated ability to research target markets (employers and clients).	Ability to: 1.1. Research demographic data. 1.2. Create surveys. 1.3. Collaborate with linkage organizations. 1.4. Research business clients with reference material. 1.5. Review historical placement data. 1.6. Assist in updates of labor market surveys. 1.7. Organize advisory committees. 1.8. Identify skills of clients (through interview, DOT, etc.). 1.9. Research customized training opportunities. 1.10. Keep abreast of relevant information. 1.11. Target area by participant need and employer profile. Knowledge of: 1.12. Special populations and their needs. 1.13. Employer characteristics.
2. Demonstrated ability to analyze and use labor market information effectively.	Ability to: 2.1. Track employment and unemployment trends/forecasts. 2.2. Use U.S. Labor Statistics from Employment Security and other relevant data. 2.3. Determine area demographics. 2.4. Identify companies opening, closing, or expanding in the area. 2.5. Provide labor market information to participants and staff. 2.6. Identify emerging occupations and changing job requirements. 2.7. Track local government economic development plans and forecasts.

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3. Demonstrated ability to recruit employers.	Ability to: 3.1. Develop list of employers using resources. 3.2. Direct mail to targeted employers. 3.3. Contact employer by cold call or referral. 3.4. Establish oneself as contact person. 3.5. Schedule appointment to explain programs. 3.6. Qualify employers based on needs and and client skills. 3.7. Establish employer eligibility (e.g., relocations, OJT, tax credits) 3.8. Identify acceptable wages and benefits. 3.9. Maintain employer information files. 3.10. Follow up initial contacts of potential employers. 3.11. Provide pre-screening employment services. 3.12. Document employer contacts and follow up. 3.13. Maintain contacts and memberships in organizations that include employers.
4. Demonstrated ability to develop leads.	Ability to: 4.1. Meet with employers to determine needs (quantity and skills of workers). 4.2. Provide overview of relevant programs and benefits to employer. 4.3. Identify job leads by accessing job search resources (e.g., professional journals, newspapers, employment services) 4.4. Identify previous/current JTPA and other program contracts. 4.5. Obtain comprehensive job opening information from employer. 4.6. Obtain job order 4.7. Screen job orders. 4.8. Assist employers with other services in the community.
5. Demonstrated ability to conduct pre-employment counseling and instruction.	Ability to: 5.1. Assess participant skills, needs, barriers, work history, attitudes. 5.2. Counsel participants regarding alternative employment/training plans. 5.3. Refer participants to training, apprenticeships, vocational rehabilitation, and/or other appropriate alternatives. 5.4. Motivate participants to be goal-directed. 5.5. Teach interview and job search skills. 5.6. Maintain job opening information. 5.7. Oversee and assist in job search. 5.8. Critique resumes, job applications, and cover letters. 5.9. Teach job-keeping/retention skills and behaviors. Knowledge of: 5.10. Relevant programs, procedures, regulations, eligibility requirements. 5.11. Resume formats. 5.12. Labor laws.

6. Demonstrated ability to conduct client screening and referrals.	Ability to: 6.1. Develop knowledge of participant (work with counselor). 6.2. Collect and record appropriate information. 6.3. Develop system of organizing applicant information/resume. 6.4. Organize job orders. 6.5. Develop referral system. 6.6. Disseminate job orders.
7. Demonstrated ability to initiate placement.	Ability to: 7.1. Match participant and job lead. 7.2. Assess and match employer EEO/ADA needs. 7.3. Contact employer to determine whether job has been filled. 7.4. Negotiate terms of contract. 7.5. Call employer to verify placement information. 7.6. Develop contract. Knowledge of: 7.7. Contract requirements. 7.8. Negotiation techniques.
8. Demonstrated ability to assess post-placement progress.	Ability to: 8.1. Coordinate with case manager to monitor progress of employee and employer. 8.2. Evaluate progress/success. 8.3. Review and evaluate success with participant and employer. 8.4. Reevaluate and modify placement and plan as necessary. 8.5. Maintain positive and continuing relations with participants and employers after placement. 8.6. Refer participant for corrective action.
9. Demonstrated ability to support interagency activities.	Ability to: 9.1. Participate in the development of interagency plan. 9.2. Review/evaluate interagency plan. 9.3. Plan and/or implement cooperative activities. 9.4. Review and evaluate cooperative activities. 9.5. Maintain ongoing dialogue with other agencies. 9.6. Participate in evaluating other agencies' plans.

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LEARNING OBJECTIVES
MARKETING
Revised April 1995

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GENERAL OBJECTIVES	SUB-OBJECTIVES
1. Demonstrated ability to perform marketing activities (planning, implementation, evaluation).	Ability to: 1.1. Match marketing strategy to agency's capabilities. 1.2. Develop and maintain relationships with key contacts, including governing board. 1.3. Design a marketing plan. 1.4. Develop a marketing budget. 1.5. Submit the plan for review and approval. 1.6. Create procedures for marketing activities. 1.7. Communicate and market the plan to others. 1.8. Assign responsibilities and benchmarks. 1.9. Monitor activities and timelines. 1.10. Solicit formal and informal feedback. 1.11. Assess whether benchmarks were attained. 1.12. Assess the effectiveness of the activities. 1.13. Redefine the plan based on ongoing assessment. 1.14. Prepare regular activity reports. 1.15. Establish internal/external contacts for agency information. 1.16. Coordinate requests for speakers and materials. 1.17. Prepare public/media information. 1.18. Match the message to the medium and the audience(s). 1.19. Participate in job fairs and other events. 1.20. Prepare others for media interviews and public presentations. 1.21. Represent the agency on appropriate community groups and activities. 1.22. Serve as an agency spokesperson. 1.23. Project a positive internal/external agency image. Knowledge of: 1.24. Marketing principles and techniques

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2. Demonstrated ability to prepare internal/external communications.	Ability to: 2.1. Identify the audience. 2.2. Identify message and/or services to be promoted. 2.3. Develop a working knowledge of services promoted. 2.4. Customize a written presentation to audience and/or media. 2.5. Adhere to standard format and style for publications. 2.6. Create a unique and consistent image for communications. 2.7. Obtain approvals where needed. 2.8. Approve/review communications by others. 2.9. Ensure key people are aware of communications sent/made. 2.10. Prepare and deliver oral presentations. 2.11. Design promotional materials (brochures, flyers, information packets). 2.12. Prepare public/media information (newsletters, PSAs, ads, news releases). 2.13. Prepare proposals, reports and policy papers. 2.14. Prepare invitations/programs. 2.15. Coordinate the distribution of materials. 2.16. Conduct follow-up activities.
3. Demonstrated ability to coordinate special events.	Ability to: 3.1. Identify objectives/goals for event. 3.2. Identify the type of event to meet needs. 3.3. Establish a budget for event. 3.4. Develop guest/VIP list. 3.5. Secure a location. 3.6. Ensure room arrangements are completed. 3.7. Confirm speakers. 3.8. Ensure media exposure (before, during, after). 3.9. Invite/confirm participants. 3.10. Prepare agenda/logistics for presenters. 3.11. Meet special needs of guests. 3.12. Provide awards and commemorative materials. 3.13. Arrange for greeters. 3.14. Arrange for ticketing and cash procedures. 3.15. Evaluate attainment of objectives and goals. 3.16. Conduct follow-up activities.

LEARNING OBJECTIVES
MIS

January 1995

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GENERAL OBJECTIVES	SUB-OBJECTIVES
1. Demonstrated ability to maintain/administer the network and system integrity	Ability to: 1.1. Assign rights. 1.2. Add/delete users. 1.3. Clear stations. 1.4. Broadcast messages. 1.5. Arrange for security and confidentiality. 1.6. Make backups. 1.7. Perform network and system maintenance activities (purging, archiving, housekeeping). 1.8. Monitor disk space. 1.9. Monitor utilization rates. 1.10. Monitor/regulate usage. 1.11. Develop virus protections. 1.12. Maintain E-mail and other network utilities. 1.13. Effect data transfers. 1.14. Obtain technical assistance from appropriate staff and resources. 1.15. Control print queues. 1.16. Repair corrupt files. 1.17. Shut down the server/system.
2. Demonstrated ability to participate in program planning and evaluation cycle	Ability to: 2.1. Review RFPs, annual plans, grant applications and contracts for MIS implications. 2.2. Participate in initial planning and strategy meetings. 2.3. Create statistical reports on previous programs. 2.4. Provide input into setting goals. 2.5. Develop systems and processes for data collection. 2.6. Ensure that users know what data is required. 2.7. Develop operational and management tools. 2.8. Prioritize the importance of data elements that impact performance standards. 2.9. Use data to impact program strategies. 2.10. Review data elements critical to performance standards to determine program changes. 2.11. Interpret performance reports for users. 2.12. Analyze program performance against original goals. 2.13. Participate in ongoing project management team meetings. 2.14. Prepare project reports. 2.15. Present project results.

3. Demonstrated ability to collect and use data	Ability to: 3.1. Identify the data required by regulations and by local management. 3.2. Verify the accuracy of data. 3.3. Verify the reasonableness of data. 3.4. Anticipate errors/problem areas and field test instruments. 3.5. Recommend edit checks. 3.6. Write programs or queries. 3.7. Compare local data to state data. 3.8. Troubleshoot mismatches between state and local data. 3.9. Make corrections as necessary. 3.10. Maintain integrity of database by conducting systematic checks. 3.11. Involve others in verifying data accuracy and reasonableness. 3.12. Sample data to discover errors. 3.13. Match client data against payroll data. 3.14. Run audit reports. 3.15. Maintain client files. 3.16. Perform data entry responsibilities.
4. Demonstrated ability to participate in training activities	Ability to: 4.1. Determine training needs based on analyses of performance/errors or new program needs. 4.2. Identify/evaluate training resources. 4.3. Consult with others in developing training plans. 4.4. Participate in formal and informal training activities (technical and program). 4.5. Develop a training program. 4.6. Prepare instructional materials. 4.7. Conduct the training (classroom and individual). 4.8. Keep users informed of changes (team meetings, work groups, newsletters). 4.9. Evaluate training effectiveness. 4.10. Provide training follow-up where needed. 4.11. Participate in MIS user group.

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5. Demonstrated ability to generate reports	Ability to: 5.1. Define users' needs. 5.2. Insure that data is available. 5.3. Write documentation. 5.4. Write needed programs (user or self-initiated). 5.5. Request programming from other sources where necessary. 5.6. Verify output. 5.7. Establish procedures for use of reports. 5.8. Establish distribution list. 5.9. Access reports or data from other agencies. 5.10. Eliminate unneeded reports. 5.11. Modify reports/programs. 5.12. Prepare written summaries of reports. 5.13. Summarize reports verbally. 5.14. Interpret reports for users. 5.15. Prepare formal scheduled reports.
6. Demonstrated ability to modify hardware and software	Ability to: 6.1. Evaluate need for modifications. 6.2. Provide input to long-range planning for hardware and software at the local and state levels. 6.3. Establish standards for hardware and software. 6.4. Determine appropriate physical and electronic configurations. 6.5. Keep abreast of current technology. 6.6. Research products. 6.7. Provide input to the budget planning process. 6.8. Make recommendations for purchase. 6.9. Coordinate the acquisition of hardware and software. 6.10. Install hardware. 6.11. Install software. 6.12. Test hardware and software. 6.13. Dispose of obsolete equipment/software.
7. Demonstrated ability to provide technical assistance to staff/users	Ability to: 7.1. Establish the process for getting technical assistance. 7.2. Maintain a help desk. 7.3. Maintain a reference library. 7.4. Order supplemental manuals or materials. 7.5. Publicize resources. 7.6. Maintain a set of tools and equipment. 7.7. Train key operators at off-site locations. 7.8. Interact tactfully with users. 7.9. Prepare user guides/information.

8. Demonstrated ability to maintain equipment	Ability to: 8.1. Instruct users on proper usage and care of equipment. 8.2. Perform routine preventive maintenance. 8.3. Run diagnostics. 8.4. Make physical repairs. 8.5. Order parts and upgrades. 8.6. Solicit technical advice from manufacturers. 8.7. Evaluate the cost of repairs versus replacement. 8.8. Maintain current inventory of equipment. 8.9. Troubleshoot problems with off-site users. 8.10. Cope with equipment inadequacies and frustrations. 8.11. Arrange for outside maintenance.
9. Demonstrated ability to supervise technical staff	Ability to: 9.1. Assign/prioritize tasks to staff. 9.2. Define the overall duties for staff. 9.3. Conduct formal and informal evaluations. 9.4. Coach staff members. 9.5. Perform personnel functions. 9.6. Make hiring recommendations to supervisor. 9.7. Conduct interviews for new staff. 9.8. Keep staff informed of policy/program changes. 9.9. Conduct staff meetings. 9.10. Ensure that staff follow standard operating procedures. 9.11. Determine adequacy of staffing levels and capabilities. 9.12. Ensure that task/projects are being completed in a timely manner. 9.13. Take corrective/disciplinary actions. 9.14. Ensure that staff attend seminars/meetings. 9.15. Resolve conflicts among employees.
10. Demonstrated ability to perform administrative duties	Ability to: 10.1. Resolve issues or questions among intra- or inter-agency groups. 10.2. Serve as liaison with other staff and other agencies. 10.3. Make presentations to a variety of groups. 10.4. Prepare general correspondence. 10.5. Develop internal standard operating procedures. 10.6. Analyze the effect of proposed policy changes. 10.7. Manage a budget. 10.8. Complete expense reports. 10.9. Complete time distribution reports. 10.10. Requisition unit supplies. 10.11. Attend general staff meetings.

LEARNING OBJECTIVES
MONITORING

February 1995

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GENERAL OBJECTIVES	SUB-OBJECTIVES
1. Demonstrated ability to procure funds	Ability to: 1.1. Complete all necessary documentation. 1.2. Obtain insurance. 1.3. Execute proper bid process. 1.4. Determine type of procurement. Knowledge of: 1.5. Procurement guidelines and regulations.
2. Demonstrated ability to conduct in-house and subcontractor monitoring	Ability to: 2.1. Complete systematic checklists. 2.2. Develop plan for desired results. 2.3. Define monitor's responsibilities. 2.4. Conduct proactive and consultative reviews of procedures and systems. 2.5. Conduct financial reviews. 2.6. Analyze regulatory procedures. 2.7. Conduct compliance reviews. 2.8. Conduct reviews for employability and eligibility. 2.9. Conduct quality reviews. 2.10. Interpret results of reviews. Knowledge of: 2.11. Monitoring requirements and procedures.
3. Demonstrated ability to complete reports and follow up	Ability to: 3.1. Report technical assistance comments made by administrative entitities. 3.2. Report corrective actions to be taken. 3.3. Make constructive recommendations for quality improvement. 3.4. Follow up with independent monitoring for implementation of corrective action plan. Knowledge of: 3.5. Report formats.

4. Demonstrated ability to oversee and supervise internal and external activities	Ability to: 4.1. Retrieve and analyze reports. 4.2. Develop and be informed of policies, procedures, legal requirements, and performance systems. 4.3. Oversee/coordinate activies. 4.4. Review issuances. 4.5. Provide policy interpretation and implementation. 4.6. Track quality and performance of subcontractors. 4.7. Implement systems (assessment, monitoring, intake/assessment, case management). 4.8. Provide technical assistance to staff. 4.9. Conduct crisis intervention and problem solving. 4.10. Conduct external monitoring for subcontractors. 4.11. Produce drafts of briefs and/or reports on operations for external use. Knowledge of: 4.12. Policy and procedures requirements. 4.13. Internal and external systems.

LEARNING OBJECTIVES
SUPERVISION/MANAGEMENT

Revised April 1995

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GENERAL OBJECTIVES	SUB-OBJECTIVES
1. Demonstrated ability to communicate information.	Ability to: 1.1. Prepare reports. 1.2. Write inter- and intra-departmental correspondence. 1.3. Prepare proposals. 1.4. Prepare presentations. 1.5. Develop constructive relationships with superiors, peers and subordinates. 1.6. Make presentations. 1.7. Develop forms. 1.8. Conduct meetings. 1.9. Prepare and provide understandable and sufficiently detailed explanations as required or requested. 1.10. Fill out/complete forms. 1.11. Establish communication protocols in area of responsibilities. 1.12. Follow existing communication protocols. 1.13. Market programs and services. 1.14. Communicate relevant information to appropriate parties. 1.15. Receive and respond to reports. 1.16. Respond to emergency situations. 1.17. Assist in developing policies and procedures. 1.18. Ask and answer questions. 1.19. Respond to breakdown in communication protocols. 1.20. Assess situation/context of questions to identify issues.

2. Demonstrated ability to manage personnel/staff.	Ability to: 2.1. Screen and interview prospective employees. 2.2. Monitor and critique staff work and evaluate personnel performance. 2.3. Conduct performance appraisals. 2.4. Identify task expectations and standards for employees. 2.5. Recommend salary and position adjustments. 2.6. Schedule staff and activities. 2.7. Document personnel actions and achievements. 2.8. Advocate for adequate resources to do the job. 2.9. Manage effectively with available resources. 2.10. Follow up on directives. 2.11. Provide counseling and personal intervention for employees related to job performance. 2.12. Provide initial orientation for new employees. 2.13. Recommend dismissals, suspensions, and hires. 2.14. Maintain open lines of communication. 2.15. Provide ongoing feedback to staff. 2.16. Mediate differences among personnel. 2.17. Monitor time, attendance/leave and payroll. 2.18. Schedule staff and individual meetings. 2.19. Write and revise job descriptions. 2.20. Solicit feedback. 2.21. Monitor employee adherence to professional, moral and ethical standards. 2.22. Participate in continuous improvement and similar activities. Knowledge of: 2.23. Management theory. 2.24. Supervisory techniques. 2.25. Relevant labor law. 2.26. Personnel rules.

3. Demonstrated ability to manage and provide staff development.	Ability to: 3.1. Identify individual development goals. 3.2. Access staff development resources. 3.3. Solicit feedback on training. 3.4. Provide initial and ongoing training. 3.5. Maintain staff awareness of agency mission/goals. 3.6. Cross-train staff. 3.7. Identify group needs. 3.8. Encourage staff to continue their education. 3.9. Participate in workshops, seminars, and training programs. 3.10. Coordinate the acquisition of contract training. 3.11. Conduct training sessions. 3.12. Prepare appropriate Standard Operating Procedures. 3.13. Inform staff of current information and activities. 3.14. Respond to specific requests for information. 3.15. Develop and participate in mentoring. 3.16. Identify and utilize resources within staff.
4. Demonstrated ability to manage change.	Ability to: 4.1. Recognize issues, problems and opportunities needing a decision. 4.2. Shift work/staff responsibilities. 4.3. Clarify areas/responsibilities within one's control. 4.4. Assess alternatives in light of policies and procedures. 4.5. Develop strategies to help employees accept change. 4.6. Delegate decision-making to others when appropriate. 4.7. Develop alternatives in light of policies and procedures. 4.8. Accept responsibility for decision-making. 4.9. Accept accountability for decisions. 4.10. Provide feedback to decisions made elsewhere. 4.11. Evaluate outcomes of decisions. 4.12. Take risks. 4.13. Manage risktaking situations. 4.14. Repeat decision-making process if necessary. 4.15. Provide leadership and vision for change. 4.16. Collect information, research and analyze issues. 4.17. Inform staff of issues and resulting potential changes. Knowledge of: 4.18. Organizational dynamics. 4.19. Corporate culture.

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5. Demonstrated ability to lead internal and interagency workteams.	Ability to: 5.1. Represent one's team. 5.2. Promote a team spirit. 5.3. Share ideas and information among team leaders and members. 5.4. Develop rapport with team members. 5.5. Provide leadership. 5.6. Act as a role model. 5.7. Act as a liaison between management and staff. 5.8. Interpret goals. 5.9. Resolve conflicts. 5.10. Project commitment to reach goal. 5.11. Support team within limits of authority. 5.12. Develop and maintain good morale. 5.13. Establish professional standards for the team. 5.14. Promote creativity. 5.15. Seek and reach consensus. 5.16. Encourage participation of all team members. 5.17. Identify barriers to team development. 5.18. Re-evaluate team membership. 5.19. Understand group dynamics and facilitate positive interaction. 5.20. Implement team decisions. Knowledge of: 5.21. Other agencies' plan and mission.

6. Demonstrated ability to manage programs and services.	Ability to: 6.1. Understand state and grant guidelines relevant to development of program services. 6.2. Participate in the planning process to determine resources, schedules, and staff needs. 6.3. Determine personnel needs and availability. 6.4. Recognize staff capabilities and deficiencies. 6.5. Determine resource needs and availability. 6.6. Develop a budget. 6.7. Distribute assignments. 6.8. Prioritize the tasks (orally or written). 6.9. Follow up on assignments. 6.10. Articulate work objectives. 6.11. Advocate for needed resources and options. 6.12. Maintain focus on tasks and goals during day-to-day activities. 6.13. Determine outcomes/goals. 6.14. Create a customer recruitment strategy. 6.15. Set up a task timeline. 6.16. Monitor program performance. 6.17. Oversee service delivery. 6.18. Operate within a budget. 6.19. Obtain appropriate approvals. 6.20. Design and/or participate in design of request for proposal. 6.21. Evaluate program performance. 6.22. Measure customer satisfaction. 6.23. Make course corrections based on customer satisfaction and program evaluation. Knowledge of: 6.24. Appropriate forms and reports. 6.25. Relevant regulations and statutory requirements. 6.26. Agency plan, mission statement, and services. 6.27. Procurement rules.
7. Demonstrated ability to motivate staff.	Ability to: 7.1. Offer recognition. 7.2. Develop methods of recognition and rewards. 7.3. Encourage upward mobility. 7.4. Support employees in their work/decisions. 7.5. Delegate authority to make decisions. 7.6. Create a good physical environment. 7.7. Identify individual employee motivators. 7.8. Find resources to provide motivators. 7.9. Create a positive atmosphere. 7.10. Project a "can-do" attitude. 7.11. Share power of decision-making and authority. 7.12. Provide follow-through and closure. 7.13. Encourage creativity and risktaking. 7.14. Distribute resources fairly.

8. Demonstrated ability to manage information.	Ability to: 8.1. Establish a system for information retrieval, collection and analysis. 8.2. Access information using the MIS system. 8.3. Create reports using the MIS system. 8.4. Provide input on needs to MIS personnel (information and equipment). 8.5. Evaluate and report inconsistencies in information. 8.6. Collect information. 8.7. Analyze information. 8.8. Maintain confidentiality. 8.9. Change programs based on program analysis. 8.10. Read and digest all pertinent written information received. 8.11. Distribute information to appropriate persons. 8.12. Inform self on issues, trends and regulations. 8.13. Ensure that MIS and fiscal systems agree. 8.14. Evaluate usefulness of information. 8.15. Utilize Internet and other appropriate electronic systems and databases. 8.16. Understand capabilities and requirements of MIS system.
9. Demonstrated ability to solve problems.	Ability to: 9.1. Anticipate problems. 9.2. Define the problem. 9.3. Determine significance of problem. 9.4. Determine who is involved in the problem and solution. 9.5. Gather data. 9.6. Analyze information. 9.7. Brainstorm potential solutions. 9.8. Determine costs of solutions. 9.9. Make a decision. 9.10. Facilitate acceptance of solutions by involved parties. 9.11. Implement a solution. 9.12. Evaluate solutions. 9.13. Follow up. 9.14. Facilitate acceptance of solution by involved parties.
10. Demonstrated ability to develop personal/professional style.	Ability to: 10.1. Practice time management. 10.2. Practice stress management. 10.3. Continue professional education. 10.4. Set priorities and make judgment calls. 10.5. Self-evaluate. 10.6. Develop and maintain professional network.

11.	Demonstrated ability to develop Board/CEO involvement.	Ability to: 11.1. Identify mission statement and goals. 11.2. Facilitate nomination/appointment process. 11.3. Train new members in relevant policies. 11.4. Maintain consistency in transfer of board members. 11.5. Define board ethics. 11.6. Facilitate strategic planning and policy development processes. 11.7. Broaden CEO and board involvement and interest. 11.8. Increase visibility of board members in community.

LEARNING OBJECTIVES
PROGRAM PLANNING/DEVELOPMENT

February 1995

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GENERAL OBJECTIVES	SUB-OBJECTIVES
1. Demonstrated ability to identify and gather data	Ability to: 1.1. Obtain and review internal reporting information (fiscal, MIS, monitoring and evaluation). 1.2. Implement local employer survey. 1.3. Obtain labor market information from available sources (OCIS, Harris Directory, etc.). 1.4. Interview staff regarding client needs. 1.5. Meet with staff of other agencies to identify sources of job orders. 1.6. Review national trends in employment and training, changes in overall economy. 1.7. Identify resources for service delivery including inventorying local service providers. 1.8. Identify potential funding sources. Knowledge of: 1.9. Data gathering techniques. 1.10. Sources of data, including labor market information and client needs. 1.11. Available resources and programs. 1.12. Potential funding sources. 1.13. Appropriate laws and legislation. 1.14. Relevant research. 1.15. Resource materials and systems.
2. Demonstrated ability to analyze reports and data	Ability to: 2.1. Review data gathered. 2.2. Review agency status in relation to performance standards, goals, required outcomes. 2.3. Compute numerical data and perform statistical analysis. 2.4. Develop projections. 2.5. Examine past expenditure patterns. 2.6. Evaluate past performance of contractors. 2.7. Search for trends and patterns regarding problem areas and needs. 2.8. Identify cause and effect relationships. 2.9. Determine needs of employers. 2.10. Identify target occupations. 2.11. Identify skill requirements of occupations. 2.12. Review existing programs for ideas and coordination. 2.13. Interpret legislation and regulations for local use. 2.14. Identify administrative and programmatic issues. Knowledge of: 2.15. Statistical methods. 2.16. Data interpretation techniques.

3. Demonstrated ability to develop programs	Ability to: 3.1. Consult with staff to determine client needs and program priorities. 3.2. State the problem the program will address. 3.3. Identify target population. 3.4. Analyze demographic and skill data on target population. 3.5. Identify desired outcomes. 3.6. State program objectives. 3.7. Identify strategies to meet each objective. 3.8. Identify requirements of funding source. 3.9. Identify prescribed program limitations. 3.10. Determine general program methodology. 3.11. Determine benefits of program.
4. Demonstrated ability to design programs	Ability to: 4.1. Draft program descriptions. 4.2. Specify program components. 4.3. Specify performance and budget constraints. 4.4. Assess whether plans can be accomplished with available funding. 4.5. Specify evaluation components. 4.6. Convene internal and external resources to assist in program design. 4.7. Identify resources for program coordination. 4.8. Identify resources to assist in program support (internal and external). 4.9. Identify resources for staff development. Knowledge of: 4.10. Elements of specific programs. 4.11. Curriculum design techniques.
5. Demonstrated ability to administer request for proposal process	Ability to: 5.1. Prepare RFP timeline. 5.2. Draft specifications, guidelines, and instructions. 5.3. Prepare all appropriate and/or required documents and forms. 5.4. Develop and maintain bidder list. 5.5. Distribute the RFP. 5.6. Prepare and facilitate bidders' conference. 5.7. Set up review teams and evaluate responses to RFP. 5.8. Prepare recommendations for governing body. 5.9. Notify proposers of acceptance or rejection. Knowledge of: 5.10. RFP and proposal formats.

6. Demonstrated ability to write the plan (or other grant application)	Ability to: 6.1. Establish budget constraints. 6.2. Write curriculum outline. 6.3. Establish entry criteria. 6.4. Establish benchmarks. 6.5. Determine number of clients served. 6.6. Describe recruitment plan. 6.7. Specify follow-up process. 6.8. Design evaluation component. 6.9. Identify staffing needs. 6.10. Develop the budget. 6.11. Establish data collection process. 6.12. Prepare a planning schedule using tools such as Gant Charting, PERT. 6.13. Develop implementation plan and timelines. 6.14. Design forms and attachments. 6.15. Develop answers to specific questions from funding organization. 6.16. Organize and present data and information in appropriate format. 6.17. Draft narrative. 6.18. Oversee editing and production of final document. 6.19. Re-evaluate process when proposals are not funded. Knowledge of: 6.20. Proposal formats and procedures. 6.21. Required documentation and timelines. 6.22. Proposal evaluation principles. 6.23. Budget formats and elements. 6.24. Types of funders and their requirements. 6.25. Planning tools and techniques.
7. Demonstrated ability to disseminate and promote the plan	Ability to: 7.1. Prepare summary of plan. 7.2. Administer review and comment process. 7.3. Publicize availability of plan. 7.4. Report to planning or governing body. 7.5. Facilitate governing body's approval and signatory process. 7.6. Determine stakeholders. 7.7. Include stakeholders in planning process. 7.8. Disseminate information and description of benefits to stakeholders. 7.9. Acknowledge contributions of stakeholders.

8. Demonstrated ability to review, evaluate and consult regarding the plan	Ability to: 8.1. Review plan implementation. 8.2. Perform in-house evaluation of program performance. 8.3. Prepare modifications as needed. 8.4. Consult with other functional areas regarding implementation and application of plan. 8.5. Provide advice and information on internal systems, forms, and processes. 8.6. Respond to requests for programmatic information. 8.7. Serve as resource to other agencies on planning-related information. 8.8. Write letters of support for other agencies/organizations' funding requests. Knowledge of: 8.9. Monitoring and evaluation procedures and techniques. 8.10. Procurement, fiscal and MIS processes.

LEARNING OBJECTIVES
TRAINING/INSTRUCTION

December 1994

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GENERAL OBJECTIVES	SUB-OBJECTIVES
1. Demonstrated ability to identify needs of customers (employers and clients)	Ability to: 1.1. Identify resources (people, data, materials). 1.2. Certify customer eligibility. 1.3. Explain assessment process to customer. 1.4. Determine assessment tools. 1.5. Develop assessment tools. 1.6. Administer assessment tools. 1.7. Identify client's current level of knowledge, skill, and ability. 1.8. Identify client's areas of interest. 1.9. Identify barriers. 1.10. Refer customer to service provider. 1.11. Identify customer's goals. 1.12. Identify employer needs.
2. Demonstrated ability to establish instructional goals	Ability to: 2.1. Review assessment results and legislative and agency mandates. 2.2. Research existing materials. 2.3. Research relevant labor market needs. 2.4. Determine overall purpose of training. 2.5. Formulate learning objectives. 2.6. Identify desired outcomes/competencies. 2.7. Outline course content. 2.8. Establish timetable. 2.9. Determine needed resources/equipment.
3. Demonstrated ability to plan training programs and determine curriculum	Ability to: 3.1. Review existing curricula. 3.2. Acquire or develop course content. 3.3. Write and/or modify course content. 3.4. Organize program content and implementation. 3.5. Assist in developing contingency plans.
4. Demonstrated ability to plan and prepare for instructional delivery	Ability to: 4.1. Review learning objectives. 4.2. Set time frames. 4.3. Profile clients/learners. 4.4. Determine instructional method. 4.5. Modify instructional method. 4.6. Inventory current resources. 4.7. Gather additional resources. 4.8. Select and modify teaching aids. 4.9. Determine instructional scope and sequence. 4.10. Develop instructional evaluation plan. 4.11. Write instructional delivery plan.

5. Demonstrated ability to conduct pre-training activities	Ability to: 5.1. Determine logistical needs (e.g., site, audiovisual, class size, schedule). 5.2. Arrange logistics. 5.3. Enroll participants.
6. Demonstrated ability to deliver training	Ability to: 6.1. Administer pre-test if needed. 6.2. Create environment conducize to learning. 6.3. Set facilitator's expectation of customers. 6.4. Discuss expectations of customer from training experience. 6.5. Present learning objectives. 6.6. Present training agenda. 6.7. Provide a variety of learning activities. 6.8. Teach skills. 6.9. Facilitate discussion. 6.10. Provide information. 6.11. Facilitate learning. 6.12. Incorporate course content. 6.13. Use resources and equipment effectively. 6.14. Interact effectively with learner. 6.15. Adjust program/methodology as needed. 6.16. Make relevance of course clear to learner. 6.17. Act as advocate for learner. 6.18. Provide learning opportunities for learners to experience success. 6.19. Introduce learner to self-directed activities. 6.20. Incorporate learner's life experience and past successes. 6.21. Manage group behavior. 6.22. Take attendance. 6.23. Administer post-test if needed. 6.24. Assess post-test results. 6.25. Provide additional instruction as needed.

7. Demonstrated ability to evaluate results of programs	Ability to: 7.1. Design or select evaluation forms. 7.2. Administer evaluation tools. 7.3. Review evaluation results. 7.4. Compile evaluation results. 7.5. Prepare report(s). 7.6. Determine whether employer needs were satisfied. 7.7. Determine whether client needs were satisfied. 7.8. Review achievement of learning objectives. 7.9. Participate in program teams/focus groups regarding program evaluation. 7.10. Incorporate customer suggestions. 7.11. Follow up to determine skills improvement and knowledge retention. 7.12. Review placement rates. 7.13. Assess effectiveness of instructional methodologies. 7.14. Make modifications as necessary.
8. Demonstrated ability to implement marketing/PR activities	Ability to: 8.1. Conduct agency/program orientation workshop. 8.2. Participate in teams/focus groups. 8.3. Perform inter-staff marketing. 8.4. Develop new markets. 8.5. Maintain contact with network. 8.6. Contribute to development of marketing materials. 8.7. Represent agency in outreach activities.